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Information Organization, Usability, Currency & Accessibility (IOUCA)
Meeting Minutes

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Revised June 20, 2006   **Date**: May 9, 2006
                                                             Time: 9:00 – 11:00 a.m.
                                                             Location: LC II, Room 340

Attendees:
☒ Neal Albritton (DOR)   ☒ Shayn Anderson (EDD)   ☒ Steve Branson (DHS)
☐ Steve Clemons (CEAP)   ☒ Donna Freeman (FTB)   ☒ Theresa Giles (DHS)
☐ Jeff Hillard (CDFA)   ☒ John Jewell (CSL)   ☒ Patrick Johnson (DOR)
☒ Anamarie Malone (DTS)   ☐ Liz Mechem (Insurance)   ☒ Claudina Nevis (SCIO)
☒ Joni Ogata (DMHC)   ☐ Kristine Ogilvie (CSL)   ☒ Bill Passavant (DSS)
☐ Rob Quigley (SCIO)   ☒ Deborah Schwartz (CRB)   ☐ Rick Vagg (DTS)
☒ John Quijada (DMV, Visiting)

Review Minutes from Previous Meeting   **Debbie Schwartz**

The minutes for the May 2nd meeting were approved with no changes.

DMV Assessment of Accessibility Recommendations   **John Quijada**

The DMV web team reviewed the draft accessibility standards. They determined that implementation of all of the standards and guidelines as they are written now would be feasible in theory, but timelines would need to allow sufficient time to implement. Large departments like DMV can take up to six months to implement changes that affect a large percentage of pages. John provided a written copy of all feedback to Neal; he will be available to Neal to answer further questions.

Web Accessibility Training   **Neal Albritton**

DTS was only able to secure a training room for four days; DOR needs 14 days for the training. They need facilities with computer labs and computer access for 25 people. BOE may be able to provide facilities for all of the training days at no cost to DOR.
Design Media can videotape the training, but it will cost the state additional money. The working group suggested we look at the quality of their work before making a decision. Neal will discuss with Claudina offline.

Templates: Recommendation vs. Evaluation   **Debbie Schwartz**

Postponed until next meeting.

Levels of Compliance (Issue #4)   **Debbie Schwartz**

The working group agreed we should strive to include levels of compliance in the recommendations where reasonable and achievable. Neal is drafting a possible approach.

Components of a Recommendation   **Debbie Schwartz**

The working group reviewed the draft components of a recommendation. They felt they looked comprehensive.

Working Group Teams   **Debbie Schwartz**

The working group split into teams to focus on developing recommendations for accessibility, usability, and cascading style sheets. Bill joined the accessibility team, Theresa moved to the Usability team, and Anamarie joined the cascading style sheet team. If we need additional people on the working teams or in the working group, we can identify the individuals. Claudina

offered to send an invitation in Clark's name. People could choose to participate in a specific area or to join the working group.

Action Items   **Debbie Schwartz**

ACTION: *Draft usability standards, guidelines, and best practices.*

        Assigned To: *Donna Freeman*

        Due: *May 16, 2006*

        Update: *Donna reviewed the federal guidelines at www.usability.gov for standards and guidelines that may benefit California but are not covered by www.usability.gov. She found that the up-front tasks that occur before the design phase were missing. She is pulling together some recommendations and should have a draft next week.*

ACTION: *Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.*

        Assigned To: *Neal Albritton, Steve Branson, Steve Clemons*

        Due: *May 16, 2006 (Update)*

        Update: *Steve Clemons is waiting to hear from Adobe. Steve provided Neal a list of file types that is currently used on ca.gov sites; there were 2-4 million file types.*

ACTION: *Develop a beginner's version of the workbook.*

        Assigned To: *Neal Albritton*

        Due: *May 23, 2006 (Update)*

        Update: *In progress*

ACTION: *Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.*

        Assigned To: *John Jewell and Rick Vagg*

        Due: *May 23, 2006 (Update)*

        Update: *John and Rick will meet to discuss.*

ACTION: *Provide a recommendation regarding IOUCA's use of the Webmaster's IT Forum and an FAQ posting on the State CIO's website (see Issue #5).*

        Assigned To: *Steve Branson*
        Due: *May 16, 2006 (Update)*

        Update: *No update – Comments from 4/25: If we create a topic in the general IT Forum, users would need to scroll down to find the IOUCA messages. Setting up a separate forum or a sub-forum would separate our messages and add a link at the top of the page. It was recommended that if we set up a separate or a sub-forum that we consider including all of the portal redesign elements such as IOUCA, CEAP, and the Portal Redesign Project. The name should be broad enough to encompass these and future related topics. John, Dan, and Steve Clemons will meet to discuss the appropriate name and scope for our forum.*

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ACTION: Document the CSS recommendation for working group review and approval.
        Assigned To: Debbie Schwartz
        Due: May 16, 2006 (Update)

        Update: The outline of components for recommendations was discussed separately in the meeting; see discussion notes above.

ACTION: Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.
        Assigned To: Claudina Nevis and Liz Mecham
        Due: May 23, 2006 (Update)

        Update: In progress. Claudina is discussing the issue.

ACTION: Amend our recommendation process to include departmental assessment of draft standards and guidelines for a real-world perspective. Not addressing real-world concerns will hurt our credibility.
        Assigned To: John Jewell, Kris Ogilvie, Debbie Schwartz
        Due: May 16, 2006 (Update)

Next Steps   **Kris Ogilvie, Debbie Schwartz**
Next IOUCA Meeting: May 16, 2006
                             Library & Courts II, 900 N Street, Room 340
                             9:00 – 11:00 a.m.

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Open Issues   **Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
    The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.

2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?[added 5/2]***
    California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.

3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
    – Level 1 Standards: Minimal accessibility
    – Level 2 Standards: Moderate accessibility
    – Level 3 Standards: High accessibility

    Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?

6. How do we separate content from HTML (CSS only separates content from presentation)?
    This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.

Parking Lot   **Debbie Schwartz**

1. *Frame the issue of application accessibility and usability.*

    Assigned To*: Steve Clemons*

    Due*: April 18, 2006 (Update)*

Update: It was agreed that these two action items are outside the scope of the IOUCA working group. We agreed that it was something we should be aware of. It was suggested that the two items be put in the parking lot for the time being and revisited in about a month.

2. *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*

   Assigned To: Steve Clemons

   Due: April 18, 2006 (Update)

   Update: See above.

3. *Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.*